Printing and Publishing

October/1975

U.S. DEPARTMENT OF COMMERCE | Domestic and International Business Administration
Bureau of Domestic Commerce

QUARTERLY INDUSTRY REPORT

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The Secretary of Commerce has determined that the publication of this periodical is necessary in the transaction of the public business required by law of this Department. Use of funds for printing this periodical has been approved by the Director of the Office of Management and Budget through May 31, 1978.

For sale by the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C., 20402, or through any U.S. Department of Commerce district office. Annual subscription $3.00 (75 cents additional for foreign mailing).

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Printing and Publishing

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U.S. PRINTING AND PUBLISHING CENTERS SHOW SIZABLE GROWTH

By Rose Marie Bratland

According to the 1972 Census of Manufactures, nearly three-fifths of all establishments and more than two-thirds of total employees in the printing and publishing industries (Standard Industrial Classification 27) are located in the 50 largest U.S. printing and publishing metropolitan areas. These areas accounted for nearly three-fourths of total value added by manufacture for the printing and publishing industries. The designation of these Standard Metropolitan Statistical Areas (SMSA's) as the 50 largest printing and publishing centers was determined on the basis of value added by manufacture.

The total number of printing and publishing establishments located in these 50 metropolitan areas increased by 2,700 establishments (12%) in the 1967-72 period, as employment dropped by 1% and value added by manufacture rose 38%. Of the 50 centers, only 4 experienced a decline in the number of establishments while 15 centers showed employment losses. All 50 centers reported a rise in value added by manufacture during this period.

The 10 Major SMSA's

The 10 leading U.S. printing and publishing centers shown in table 1 represent a sizable share of the Nation's printing and publishing activity. Over a third of all printing and publishing establishments were located in these 10 SMSA's in 1972, and nearly two-fifths of total industry employees worked in these establishments. Value added by manufacture for the 10 centers amounted to nearly half (46%) of the industry's value added by manufacture in 1972.

Among the top 10 SMSA's, Washington, D.C. showed the most growth in all three statistical measures between 1967 and 1972, with an increase of nearly 200 establishments (from 517 to 704), a 15% gain in employment and a 53% increase in value added. New York City experienced the only loss in number of establishments among the 10 centers, with a decline of 200 plants. In addition, from 1967 to 1972, New York City's printing and publishing employment fell by 24,000 persons, a drop of 15%. However, Cleveland's 1972 employment level showed the greatest rate of decline, dropping 19% below its 1967 level. Of the top 10 centers, San Francisco reported the slowest growth rate for value added by manufacture, with a 19% gain over the 1967-72 period.

Table 1.—Ranking of the Ten Largest U.S. Printing and Publishing Centers, 1972

Standard metropolitan statistical area	Ranking		
	Value added by manufacture	Number of employees	Number of establishments
New York, N.Y.	1	1	1
Chicago, Ill.	2	2	2
Los Angeles-Long Beach, Calif.	3	3	3
Philadelphia, Pa-N.J.	4	4	4
Boston, Mass.	5	5	5
Washington, D.C.-Md.-Va.	6	6	8
Detroit, Mich.	7	7	7
San Francisco-Oakland, Calif.	8	9/10	6
Cleveland, Ohio	9	9/10	13
Kansas City, Mo.-Kans.	10	13	18/19

Source: 1972 Census of Manufactures, Bureau of the Census, U.S. Department of Commerce.

SMSA Comparisons

Comparisons of 1967 and 1972 Census data pertaining to the same SMSA can be misleading since in some cases towns or countries have been added to or dropped from an SMSA because of population extensions or industrial activity. For example, the Denver SMSA acquired Boulder in 1972, but 1967 data for this SMSA does not reflect this extension. In the case of the New York SMSA, Nassau and Suffolk Counties became a separate SMSA in 1972. Although much of the 1967 data in table 2 has been adjusted to correspond to 1972 SMSA definitions, in some cases this was not possible because of unavailability of data. These special cases are pointed out in the footnotes to table 2.

Another consideration that should be taken into account in studying printing and publishing data from the SMSA's is that the size of an SMSA (based on population) may not be in direct proportion to the size of the SMSA's printing and publishing activity. For instance, Kansas City, Missouri-Kansas, ranked 10th among the SMSA's in value added by manufacture in its printing and publishing activity in 1972 but ranked 26th in population among the SMSA's.

The ranking of the 50 largest U.S. metropolitan printing and publishing centers (table 2) shows the addition of four new SMSA's to the list—Charlotte-Gastonia, North Carolina; Nassau-Suffolk, New York; Oklahoma City, Oklahoma; and Scranton-Wilkes-Barre-Hazelton, Pennsylvania. These SMSA's replace Paterson-Clifton-Passaic, New Jersey; Racine, Wisconsin; Stamford, Connecticut; and York, Pennsylvania, which were among the top 50 printing and publishing centers in 1967.

The 50 U.S. metropolitan centers showed a higher growth rate in number of establishments in the 1967-72 period than the Nation's printing and publishing industry as a whole, increasing by 2,700 establishments and accounting for three-fourths of the Nation's increase in printing and publishing establishments. Regionally, the SMSA's located in the Southern and Western States added new establishments at a faster rate than the other regions. Among the 20 SMSA's reporting an increase of over 20% in establishment growth between 1967 and 1972, 14 were located in either the South or West. Anaheim, California, led the way in establishment growth for the industry by nearly doubling its number of plants during the 1967-72 span, while Los Angeles, California, showed the largest net gain with an increase of 353 establishments. Only four of the 50 centers recorded declines in the number of plants for the 1967-72 period; chief among these was New York City's loss of nearly 200 establishments.

Industry employment nationwide climbed by 2.4% between 1967 and 1972 from 1,031,000 to 1,056,000; at the same time employment for the top 50 U.S. printing and publishing centers fell off 0.8%. Nearly two-thirds of the 50 centers had employment gains higher than the 2.4% reported for the total printing and publishing industries; however, 30% of the top 50 SMSA's showed a decline in number of employees. San Jose, California added the largest number of employees to its payroll—2,300 employees—but Los Angeles and Houston followed close behind, adding 2,100 each. As previously mentioned, New York City showed the largest decline in employment, losing 23,000 printing and publishing employees in the 1967-72 span.

The top 50 printing and publishing SMSA's value added by manufacture grew at a rate paralleling that of the entire U.S. printing and publishing industry. Total U.S. value added by manufacture climbed 41%, going from $14.4 million in 1967 to $20.2 million in 1972. The 50 largest centers accounted for over two-thirds of the increase in value added by manufacture on the national level. Value added for the 50 centers rose 38% during 1967-72 period, with 20 of these SMSA's having percentage increases lower than the average for the entire printing and publishing industry. The fact that total U.S. printing and publishing growth in value added was above that for the top 50 SMSA's indicates a considerable amount of growth in printing and publishing activity is occurring in geographic areas outside the 50 largest printing and publishing centers.

Summary

During the 1967-72 period, there was a sharp increase in the number of establishments in the top 50 SMSA's, with only four centers experiencing declines. In contrast, total employment for the 50 SMSA's was down slightly during this period, while total U.S. printing and publishing employment increased. Of the top 50 centers, 15 showed employment losses and eight of these reported decreases of 10% or more. Value added by manufacture for all 50 SMSA's recorded slightly lower gains in the 1967-72 span than did the Nation's total printing and publishing activity. Increases in value added for the 50 centers ranged from a low of 9% to a high of 100%.

The most recent Census data seems to indicate that between 1967 and 1972 the Nation's printing and publishing activity was becoming less concentrated in the 50 major printing and publishing SMSA's. During this period, employment and value added rose at a faster rate for the total U.S. printing and publishing industry than for the 50 principal printing and publishing centers. Nevertheless, the major share of the Nation's printing and publishing activity continues to take place in the industry's 50 largest metropolitan areas.

Table 2.—Fifty Largest Metropolitan Printing and Publishing Centers, 1972

Standard metropolitan statistical area	Number of establishments			Number of employees (in thousands)				Value added by manufacture (in million $)			
	1972	1967	Percent change 1967-72	1972	1967	Percent change 1967-72	1972 area rank	1972	1967	Percent change 1967-72	1972 area rank
United States, total	41,585	37,989	9.5	1,056.1	1,031.0	2.4	(X)	20,197.1	14,355.1	40.7	(X)
50 largest cities, total	24,626	21,905	12.4	697.7	703.6	−0.8	(X)	14,523.1	10,510.3	38.2	(X)
Albany-Schenectady-Troy, N.Y.[1]	124	102	21.5	4.6	5.3	−13.2	39	77.4	62.8	23.2	39
Allentown-Bethlehem-Easton, Pa.-N.J.[1]	102	91	12.1	3.9	3.8	2.6	46	58.9	45.0	30.9	46
Anaheim-Santa Ana-Garden Grove, Calif.	298	157	89.8	5.9	4.9	20.4	32	114.5	71.2	60.8	31
Atlanta, Ga.[1]	362	264	37.1	9.3	8.2	13.4	20	167.5	107.7	55.5	21
Baltimore, Md.	330	317	4.1	11.6	11.4	1.8	17	176.6	130.6	35.2	18
Boston, Mass.[4]	853	776	9.9	24.2	25.2	−3.9	5	453.4	349.5	29.7	5
Buffalo, N.Y.	222	227	−2.2	7.7	8.6	−10.5	25	130.2	104.5	24.6	26
Charlotte-Gastonia, N.C.[1]	145	81	79.0	3.8	2.9	31.0	47	60.8	30.7	98.0	45
Chicago, Ill.	2,326	2,140	8.7	86.3	88.5	−2.4	2	1,892.6	1,390.2	36.1	2
Cincinnati, Ohio-Ky.-Ind.	330	317	4.1	13.7	13.4	2.2	14	260.7	178.6	46.0	14
Cleveland, Ohio	518	473	9.5	14.5	17.8	−18.5	13	333.2	238.1	39.9	10
Columbus, Ohio[4]	182	154	18.2	6.5	5.2	25.0	31	126.8	75.1	68.8	29
Dallas-Fort Worth, Tex[2]	648	534	21.3	15.6	13.1	19.1	11	270.9	165.2	64.0	13
Dayton, Ohio	130	132	−1.5	9.2	11.2	−18.9	21	170.0	147.7	15.1	20
Denver-Boulder[3]	313	263	19.0	7.6	6.2	22.6	26	136.7	75.9	80.1	25
Des Moines, Iowa[3]	115	90	27.8	5.4	4.6	17.4	35/36	99.0	87.4	13.3	36
Detroit, Mich.[4]	679	646	5.1	17.2	17.9	−3.9	7	353.2	249.3	41.7	7
Grand Rapids, Mich.	146	143	2.1	3.2	3.2	n.c.	49	58.2	40.5	43.7	49
Hartford, Conn.[4]	159	125	27.2	4.4	3.9	12.8	40/41/42	67.0	47.7	40.5	44
Houston, Tex[4]	378	286	32.2	8.2	6.1	34.4	23	137.6	71.4	92.7	24
Indianapolis, Ind.	260	247	5.3	7.8	7.2	8.3	24	129.3	93.1	38.9	27
Jersey City, N.J.	106	103	2.9	4.4	4.8	−8.3	40/41/42	68.1	53.3	27.8	43
Kansas City, Mo.-Kans[4]	362	339	6.8	16.4	14.6	12.3	9/10	334.3	229.3	45.8	9
Los Angeles-Long Beach, Calif.	2,152	1,799	19.6	40.9	38.8	5.4	3	780.1	519.9	50.0	3
Louisville, Ky-Ind[4]	150	141	6.4	7.5	7.2	4.2	27	110.3	76.4	44.4	33
Miami, Fla.	425	293	45.1	7.4	5.5	34.5	28	149.2	63.0	36.8	22
Milwaukee, Wis.	335	297	12.8	12.3	11.4	7.9	16	201.7	128.3	57.2	17
Minneapolis-St. Paul, Minn[4]	495	408	21.3	16.5	18.7	−11.7	8	321.3	228.0	40.9	11
Nashville-Davidson, Tenn[1]	228	144	58.3	7.2	7.3	−1.4	29	114.2	77.4	47.5	32
Nassau-Suffolk, N.Y.[5]	646	440	46.8	10.5	8.7	20.7	19	215.3	116.0	85.6	16
New Orleans, La.	170	152	11.8	3.1	2.4	29.2	50	587	35.9	63.5	47
New York, N.Y.[6]	4,652	4,862	−4.3	131.0	154.7	−15.3	1	3,637.5	2,988.1	21.7	1
Newark, N.J.[4]	511	463	10.4	12.9	11.7	10.3	15	233.0	163.2	42.8	15
Oklahoma City, Okla.[4]	152	131	16.0	3.3	2.6	26.9	48	58.4	30.2	93.4	48
Philadelphia, Pa.-N.J.	1,028	949	8.3	37.6	38.3	−1.9	4	631.3	527.6	29.1	4
Phoenix, Ariz.	207	162	27.8	4.7	3.3	42.4	37/38	80.3	40.1	100.2	38
Pittsburgh, Pa.	324	329	−1.5	8.3	8.5	−2.3	22	138.6	104.7	32.4	23
Portland, Oreg.-Wash.	238	188	26.6	4.0	3.6	11.1	44/45	75.2	48.7	54.4	41
Providence-Pawtucket-Warwick, R.I.-Mass.[4]	203	191	6.3	5.5	4.8	14.6	33/34	104.6	56.5	85.1	34/35
Richmond, Va.[4]	124	104	19.2	4.7	3.9	4.4	37/38	75.9	57.0	33.2	40
Rochester, N.Y.[1]	214	182	17.6	6.8	5.5	11.5	30	127.7	86.8	47.1	28
St. Louis, Mo.-Ill.[4]	533	487	9.4	14.9	13.3	6.4	12	283.2	185.3	52.8	12
San Diego, Calif.	227	158	43.7	4.4	2.8	18.9	40/41/42	84.5	48.9	72.8	37
San Francisco-Oakland, Calif.	884	737	19.9	16.4	18.7	−10.4	9/10	344.4	290.4	18.6	8
San Jose, Calif.	204	142	43.7	5.4	3.1	28.6	35/36	121.8	69.2	76.2	30
Scranton-Wilkes-Barre-Hazelton, Pa.[7]	106	86	23.3	4.0	3.7	8.1	44/45	57.5	37.8	52.1	50
Seattle-Everett, Wash.	273	242	12.8	5.5	5.4	1.9	18	175.3	47.1	64.8	19
Springfield-Chicopee-Holyoke, Mass[4]	203	129	57.4	5.5	6.4	−14.1	33/34	104.6	71.0	8.8	34/35
Tampa-St. Petersburg, Fla.[1]	210	165	27.3	4.3	n.a.	48.3	43	74.4	37.4	98.9	42
Washington, D.C.-Md.-Va[4]	704	517	36.2	21.7	15.8	14.8	6	437.1	286.4	52.6	6

(X)—Not applicable.

[1]The definition of this standard metropolitan statistical area has been revised for 1972. Data tabulated under the new 1972 definition differ by more than 5 percent from 1972 data tabulated under the old definition. Data for 1967 are based on prior census-year definitions.

[2]Dallas SMSA was combined with Fort Worth SMSA for 1972; 1967 data have been adjusted accordingly.

[3]This SMSA changed definition in 1972; 1967 data are based on prior census-year definition.

[4]The definition of this standard metropolitan statistical area has been revised for 1972. Data tabulated under the new 1972 definition differ by 5 percent or less from 1972 data tabulated under the old definition. Data for 1967 are based on prior census-year definitions.

[5]This is a new SMSA for 1972. These counties were formerly part of New York, NY-N.J. SMSA.

[6]This SMSA changed definition in 1972, 1967 data have been adjusted accordingly.

[7]Scranton SMSA was combined with Wilkes-Barre-Hazelton, SMSA in 1972; 1967 data have been adjusted accordingly.

Source: 1972 Census of Manufactures, U.S. Department of Commerce, Bureau of the Census.

ENERGY CONSUMPTION IN THE U.S. PRINTING AND PUBLISHING INDUSTRY

By William S. Lofquist

The graphic arts industry, among other U.S. manufacturing industries, has seen a rapid increase in its energy costs since the early 1970's. Rising prices of fuels and electric energy, combined with apprehension concerning the long-range supply of natural gas, has forced printers and publishers to reexamine their energy requirements. An examination of energy consumption patterns by individual segments of the U.S. printing and publishing industry shows:

1. Graphic arts firms require considerably less expenditures for energy, as a percent of their operating budget, than the average U.S. manufacturing industry.

2. Printers and publishers consume more electrical energy and less fuels, as percentages of their total energy needs, than any other manufacturing industry.

3. Approximately 70% of energy consumption in the graphic arts industry occurs in either a commercial printing plant or newspaper firm.

4. While there appears to be no direct relationship between energy consumption and growth in industry shipments, it is notable that two industries—the electrotyping and stereotyping industry, and the letterpress and screen printing segment of the commercial printing industry—have significantly higher energy costs than other graphic arts industries and were among the lowest in rates of growth of industry shipments.

5. Attempts to transfer energy consumption from an expensive or short supply fuel source (e.g. natural gas) to a less expensive source (e.g. coal) appears to have met with little success in the graphic arts industry, for reasons of both high conversion costs and general impracticability. At the same time, some efforts to drastically curtail or eliminate energy use have in some instances lead to unforeseen problems. For example, the elimination of natural gas-consuming heat set dryers on web offset printing presses through their functional replacement by ultra-violet (uv) inks has introduced a new cost factor: nonuseable printed paper expended from the presses (formerly sold as waste) is no longer a desirable commodity since the uv inks make the paper unsatisfactory for recycling.

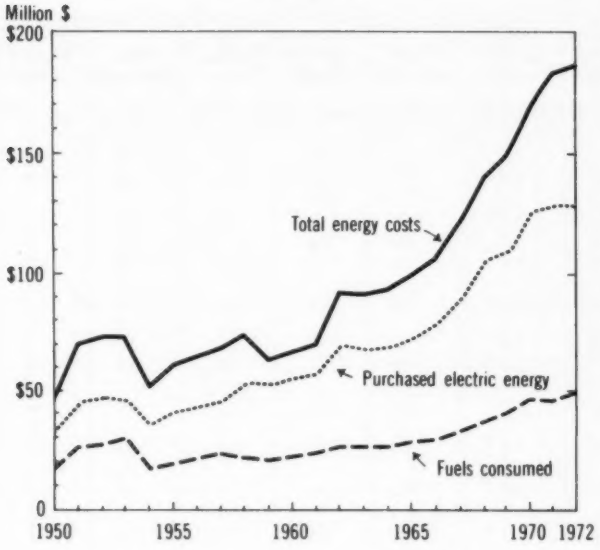
6. While the direct consumption of energy by many U.S. publishers is considerably below that of printers, publishers face indirect energy costs in several forms. Higher energy costs of printers, for example, are passed along to their publisher clients in the overall prices charged for newspaper, book, periodical, catalog, greeting card or other printed product. The heating and cooling requirements of publishers' warehousing or distribution points result in an energy cost of publishing, just as higher fuel charges in the freight transport of published products must be borne by the publisher.

Costs of Energy for the Graphic Arts

The 17 industries comprising the graphic arts spent an estimated $250-300 million on energy (fuels and electricity) in 1975, up substantially from cost levels in past years. As recently as 1972, U.S. printers and publishers had energy costs of $187 million ($50 million for fuel—primarily natural gas; and $137 million for purchased electricity). Data on energy expenses are collected each year by the Bureau of the Census, and chart 1 shows the trend of these expenses for the U.S. graphic arts industry over the period 1950-72. As depicted in this chart, printers and publishers have consistently relied on electricity rather than fuels for a greater proportion of their energy needs. In the 1950's, the ratio of electricity costs to fuel costs was two to one, but by the 1970's this ratio had increased to approximately three to one. While the trend data are expressed in current dollars, it is doubtful that this shift in inergy could be attributable solely to inflation's impact on the costs of electrical energy. This shift may more appropriately represent industry expansion, in terms of both new plants and additions to existing plants; it may also represent self induced or forced reliance on more electricity for building and warehousing operation and maintenance.

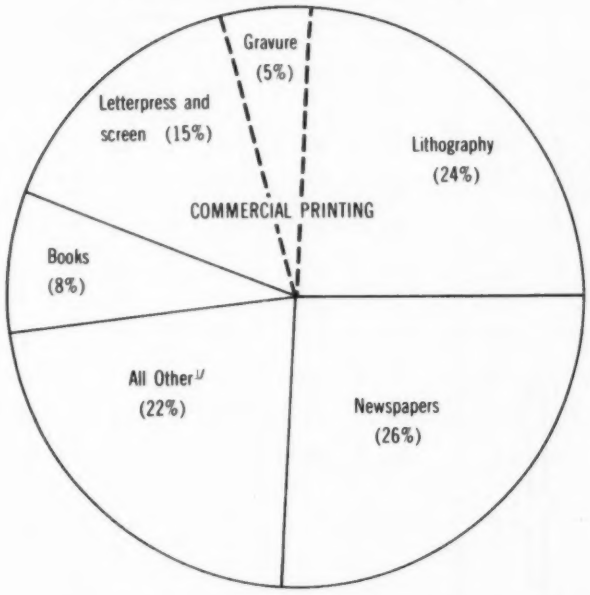
Chart 2 shows the estimated percent of energy consumption by major segments of the U.S. printing and publishing industry. Commercial printing accounts for 44% of all energy expenses in the graphic arts, followed by newspapers (26%) and book publishing and printing (8%). These percentages reflect some significant changes in energy consumption patterns from earlier years. In 1947, for example, share of energy costs accounted for by newspapers was 34%, considerably above the current estimate of 26%. Periodical publishing's share—while not shown separately in chart 2—has shrunk from 6.3% in 1947 to 3.6% in 1975, reflecting in part the divestment of printing activity by the publishers. Expanding shares of total energy consumption were found in the book publishing and book printing industries; these industries currently account for 8% of total graphic arts energy consumption, up from only 3% in 1947.

Chart 1
Energy Costs of the Printing and Publishing Industry: 1950–72



Source: U.S. Department of Commerce, Bureau of the Census.

Chart 2 – Percent of Total Energy Consumption by the U.S. Graphic Arts Industries: 1975



[1]Periodicals, miscellaneous publishing, manifold business forms, greeting card publishing, blankbooks and looseleaf binders, bookbinding, and printing trade services.

Source: U.S. Department of Commerce, Bureau of Domestic Commerce.

A review of energy expenditures by individual segments of the printing and publishing industry is shown in table 3. Total energy costs, including fuels consumed and purchased electric energy, appear for selected years between 1947 and 1972. The sparsity of data for some industries (such as commercial printing, gravure and lithographic platemaking services) is attributable to their but recent recognition within the Standard Industrial Classification system as meeting the criteria for separate industry status.

While virtually all of the printing and publishing industries listed in table 3 recorded growth in energy expenditures over the period 1947-72—due both to industry expansion and higher energy prices—the most extensive consumption took place in the newspaper industry and the commercial printing, lithographic industry. The newspaper industry is the largest consumer of electrical energy ($37 million in 1972) while the commercial printing, lithographic industry is the primary purchaser of fuels ($12 million in 1972). Both of these industries have witnessed substantial growth in product shipments in the past few decades, and high energy consumption patterns are indicative of these industrys' economic growth.

There is, however, little evidence to support the contention that energy intensiveness (as measured by the ratio of energy costs to total sales) is related to industry growth. The following list of U.S. printing and publishing industries ranks these industries by energy intensiveness, based on 1972 data, and also shows each industry's average annual rate of growth of industry sales over the period 1963-72:

Industry	Costs of energy per $100 of industry shipments (in dollars)	Average annual growth in shipments, 1963-72
Electrotyping & stereotyping	$1.36	– 7.7%
Gravure printing	1.19	11.4
Book printing	0.97	6.2
Letterpress and screen printing	0.94	3.8
Engraving and plate printing	0.94	6.8
Bookbinding and related work	0.93	5.7
Typesetting	0.91	8.0
Lithographic platemaking services	0.90	n.a.
Lithographic printing	0.83	10.1
Blankbook and looseleaf binders	0.79	9.1
Photoengraving	0.77	0.4
Manifold business forms	0.64	9.4
Newspapers	0.57	7.0
Greeting card publishing	0.56	9.4
Miscellaneous publishing	0.32	11.9
Book publishing	0.20	7.1
Periodicals	0.19	4.9

n.a.—Not available.

On the basis of the above sets of data, no demonstrable correlation between energy intensiveness and growth of industry shipments appears evident. Thus, although some industries with low growth rates are highly energy intensive (such as electrotyping and stereotyping, and letterpress and screen printing) other

Table 3.—Costs of Fuels and Electric Energy for

Year	SIC 27—Printing and publishing, total			SIC 2711—Newspapers			Sic 2721—Periodicals			SIC 2731—Book publishing		
	Total energy costs (million $)	Fuels consumed (million $)	Purchased electric energy (million $)	Total energy costs (million $)	Fuels consumed (million $)	Purchased electric energy (million $)	Total energy costs (million $)	Fuels consumed (million $)	Purchased electric energy (million $)	Total energy costs (million $)	Fuels consumed (million $)	Purchased electric energy (million $)
1972	186.8	49.6	136.7	47.0	9.9	37.1	6.7	1.1	5.6	5.7	1.5	4.2
1971	182.7	46.0	136.7	44.0	9.7	34.3	6.9	1.2	5.8	5.4	1.5	3.9
1970	169.8	46.3	123.7	39.0	8.7	30.3	7.4	1.7	5.8			
1969	149.3	40.7	108.6	37.5	7.8	29.7	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
1968	139.8	36.2	103.6	36.0	7.1	28.9	n.a.	n.a.	n.a.			
1967	120.2	32.1	88.1	32.1	7.1	25.0	6.1	1.6	4.5	3.2	0.9	2.3
1966	106.0	28.7	77.3									
1965	98.5	26.9	71.6	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
1964	92.5	25.2	67.4									
1963	91.0	24.3	66.8	26.7	5.9	20.8	3.8	0.9	2.9	2.3	0.7	1.6
1962	91.9	24.7	67.2	26.6	6.1	20.5	5.0	1.2	3.8	2.6	0.8	1.8
1961	79.8	22.2	57.7									
1960	75.9	21.4	54.5	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
1959	72.4	20.1	52.3									
1958	73.5	21.8	51.7	21.8	5.4	16.4	4.4	1.2	3.2	1.9	0.5	1.4
1957	68.3	22.6	45.7									
1956	64.3	21.0	43.3	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
1955	60.3	19.4	40.9									
1954	52.3	16.1	36.2	17.0	4.0	13.0	4.1	2.0	2.1	2.0	0.9	1.1
1953	73.7	28.2	45.5									
1952	72.9	26.7	46.3	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.			
1951	69.9	25.4	44.5									
1950	48.8	17.1	31.7	16.4	5.1	11.3	3.6	1.4	2.2	n.a.	n.a.	n.a.
1949	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.			
1948	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.			
1947	35.2	11.4	23.8	11.9	3.7	8.3	2.2	1.0	1.2	0.6	0.2	0.4

Year	SIC 2754—Commercial printing, gravure			SIC 2761—Manifold business forms			SIC 2771—Greeting card publishing			SIC 2782—Blankbooks and looseleaf binders		
1972	8.3	3.3	5.0	9.2	1.8	7.4	4.3	0.9	3.4	4.6	1.3	3.3
1971				8.4	2.0	6.5	n.a.	n.a.	2.7	3.9	1.0	2.9
1970	n.a.	n.a.	n.a.	7.6	1.6	6.0	4.2	0.8	3.4			
1969				n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
1968				n.a.	n.a.	n.a.	n.a.	n.a.	n.a.			
1967	4.6	1.8	2.8	5.0	1.2	3.8	3.0	0.7	2.3	2.5	0.7	1.8
1966												
1965	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
1964												
1963	3.3	1.3	2.0	3.2	0.8	2.4	2.0	0.6	1.4	1.5	0.5	1.0
1962				2.6	0.6	2.0	2.1	0.8	1.3	2.1	0.6	1.5
1961												
1960				n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
1959												
1958				2.1	0.6	1.5	1.5	0.6	0.9	1.2	0.4	0.8
1957												
1956							n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
1955	n.a.	n.a.	n.a.									
1954							0.9	0.3	0.6	0.9	0.3	0.6
1953												
1952				n.a.	n.a.	n.a.						
1951							n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
1950												
1949												
1948												
1947							0.4	0.1	0.3	0.6	0.2	0.4

n.a.—Not available.
[1]Includes SIC 2754—Commercial printing, gravure.
[2]Includes SIC 2761—Manifold business forms.

Source: U.S. Department of Commerce, Bureau of the Census.

the Printing and Publishing Industry, 1947-72

SIC 2732—Book printing			SIC 2741—Miscellaneous publishing			SIC—Commercial printing, letterpress and screen			SIC 2752—Commercial printing, lithographic			SIC 2753—Engraving and plate printing		
Total energy costs (million $)	Fuels consumed (million $)	Purchased electric energy (million $)	Total energy costs (million $)	Fuels onsumed (million $)	Purchased electric energy (million $)	Total energy costs (million $)	Fuels consumed (million $)	Purchased electric energy (million $)	Total energy costs (million $)	Fuels consumed (million $)	Purchased electric energy (million $)	Total energy costs (million $)	Fuels consumed (million $)	Purchased electric energy (million $)
9.1	2.4	6.7	3.4	0.7	2.7	31.0	10.9	20.1	42.7	12.4	30.3	1.9	0.5	1.4
9.0	2.6	6.4	n.a.	n.a.	2.7	[1]39.5	[1]12.4	27.1	39.7	10.1	29.6			1.3
n.a.	n.a.	n.a.	3.4	0.8	2.6	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
			n.a.	n.a.	n.a.									
			n.a.	n.a.	n.a.									
6.3	1.7	4.6	1.9	0.4	1.5	22.4	7.1	15.3	23.2	6.6	16.6	1.2	0.3	0.9
n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
4.1	1.2	2.9	1.4	0.4	1.1	19.6	6.3	13.3	15.0	3.7	11.3	1.2	0.4	0.8
3.5	0.9	2.6	1.4	0.4	1.0	24.1	7.8	16.3	14.4	3.8	10.6	1.0	0.1	0.9
n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
2.8	0.9	2.0	1.1	0.3	0.8	20.3	[1]7.5	12.9	10.1	2.8	7.3	0.8	0.3	0.5
n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	
1.5	0.4	1.1	0.8	0.2	0.6	[1]14.1	4.7	[1]9.4	[2]6.9	2.3	[2]4.6	0.5	0.1	00 4
n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
0.6	0.2	0.4	0.3	0.1	0.2	[1]11.9	[1]4.1	[1]7.8	[2]3.1	[2]0.8	[2]2.3	0.3	0.1	0.2

SIC 2789—Bookbinding and and related work			SIC 2791—Typesetting			SIC 2793—Photoengraving			SIC 2794—Electrotyping and stereotyping			SIC 2795—Lithographic platemaking services		
3.5	0.8	2.7	4.4	0.7	3.7	1.7	0.4	1.3	0.5	0.2	0.3	2.3	0.8	1.5
3.5	0.6	2.9	6.3	0.9	5.4	1.1	0.5	0.6			0.2			
n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.			
2.7	0.6	2.1	3.2	0.6	2.6	1.7	0.4	1.3	1.0	0.3	0.7			
n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.			
1.9	0.4	1.5	2.2	0.5	1.8	1.7	0.4	1.3	1.1	0.3	0.8			
1.4	0.4	1.1				1.2	0.4	0.8	1.0	0.3	0.7			
			n.a.	n.a.	n.a.									
n.a.	n.a.	n.a.				n.a.	n.a.	n.a.	n.a.	n.a.	n.a.			
1.4	0.4	1.0	1.4	0.3	1.1	1.6	0.4	1.2	1.2	0.4	0.8	n.a.	n.a.	n.a.
n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.			
0.7	0.1	0.6	0.7	0.2	0.5	1.1	0.2	0.9	1.0	0.2	0.8			
n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a	n.a.	n.a.	n.a.	n.a.			
1.0	0.3	0.7	0.6	0.2	0.4	0.9	0.2	0.7	0.8	0.3	0.5			

Table 4.—Fuels Consumed and Electrical Energy

	SIC 27—Printing and publishing, total	SIC 2711—Newspapers	SIC 2721—Periodicals	SIC 2731—Book publishing	SIC 2732—Book printing	SIC 2741—Miscellaneous publishing	SIC 2751—Commercial printing, except lithographic
Energy costs, total (million $)	182.7	38.2	7.0	5.4	9.0	3.4	39.5
Fuels consumed, total (million $)	46.0	9.6	1.2	1.5	2.6	0.7	12.4
Fuel oil:							
Total:							
Quantity (1,000 barrels)	1,323.6	261.2	19.6	66.5	124.1		385.4
Cost (million $)	5.7	1.1	0.1	0.3	0.5		1.6
Distillate:							
Quantity (1,000 barrels)	907.5	212.1	5.9	23.2	28.4		306.5
Cost (million $)	4.0	0.9	(1)	0.1	0.1	n.a.	1.3
Residual:							
Quantity (1,000 barrels)	416.1	49.1	13.7	43.3	95.7		78.9
Cost (million $)	1.7	0.2	0.1	0.2	0.3		0.3
Bituminous coal, lignite and anthracite:							
Quantity (1,000 short tons)	17.6	0.8	—	—	—	—	3.3
Cost (million $)	0.3	(1)	—	—	—	—	0.1
Coke and breeze:							
Quantity (1,000 short tons)	n.a.	n.a.	—	—	—	—	—
Cost (million $)	(1)	(1)	—	—	—	—	—
Natural gas:							
Quantity (billion cu. ft.)	38.3	8.4	1.0	0.9	2.0		2.7
Cost (million $)	19.6	3.7	0.4	0.5	1.3		6.9
Other fuels:							
Cost (million $)	4.3	1.8	(1)	0.1	0.5	n.a.	1.0
Fuels, n.s.k.:							
Cost (million $)	16.0	2.9	0.6	0.6	0.4		2.9
Electric energy:							
Purchased:							
Quantity (billion kw.-hrs.)	9.6	2.2	0.4	0.2	0.5	0.2	n.a.
Cost (million $)	136.7	28.6	5.8	3.9	6.4	2.7	27.1
Generated less sold:							
Quantity (billion kw.-hrs.)	31.5	0.2	n.a.	n.a.	n.a.	n.a.	n.a.

n.s.k.—Not specified by kind. n.a.—Not available. — Represents zero.
(1)Less than $50,000.

Source: U.S. Department of Commerce, Bureau of the Census.

Purchased, Printing and Publishing Industry, 1971

SIC 2752—Commercial printing, lithographic	SIC 2753 Engraving and plate printing	SIC 2754 Commercial printing, gravure	Sic 2761—Manifold business Forms	SIC 2771—Greeting card publishing	SIC 2782—Blankbooks and looseleaf binders	SIC 2789—Bookbinding and related work	SIC 2791—Typesetting	SIC 2793—Photo-engraving	SIC 2794—Electrotyping and stereotyping	SIC 2795—Lithographic platemaking services
39.7	n.a.		8.4	n.a.	3.9	3.5	6.3	1.1	n.a.	
10.1	n.a.		1.9	n.a.	1.0	0.6	0.9	0.5	n.a.	
228.9			56.8		28.8	14.7	2.3	4.6	n.a.	
1.1			0.3		0.1	0.1	(1)	(1)	n.a.	
198.4			26.4		14.0	14.7	1.4	4.6	—	
1.0	n.a.		0.1	n.a.	0.1	0.1	(1)	(1)	—	
30.5			30.4		14.8	—	0.9	—	n.a.	
0.1			0.2		0.1	—	(1)	—	n.a.	
13.3	—		—	—	0.3	—	—	—	—	
0.2	—		—	—	(1)	—	—	—	—	
n.a.	—	n.a.	—	—	—	—	—	—	—	n.a.
(1)	—		—	—	—	—	—	—		
7.3			1.4		1.0	0.3	0.3	0.2		
4.0			0.8		0.6	0.1	0.2	0.1		
0.4	n.a.		0.1	n.a.	(1)	0.1	0.1	(1)	n.a.	
4.3			0.2		0.3	0.4	0.6	0.3		
n.a.	n.a.		0.5	0.2	n.a.	n.a.	n.a.	n.a.	n.a.	
29.6	1.3		6.5	2.7	2.9	2.9	5.4	0.6	0.2	
n.a.	n.a.		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	

industries with relatively low growth rates exhibit equally low ratios of energy intensity (periodicals, and photoengraving). An additional factor to be considered is that the publishing industries in general have lower requirements than the printing and related industries due primarily to their lower capital equipment needs.

Energy Consumption, by Commodity

Table 4 presents detailed statistics on energy consumption, by commodity and by individual printing and publishing industry. Values shown are expressed in both current dollars and by quantity. The most recent Census data are for calandar year 1971.

The U.S. printing and publishing industries consume a variety of fuels, primarily natural gas and fuel oil. As identifiable fuels in 1971, these two energy sources accounted for at least 55% of total dollars spent on fuel by the graphic arts industry. By contrast, in 1947 only 28% of the printing and publishing fuel dollar was spent on these two commodities. Further reflecting the shifts of energy sources for the graphic arts, it is noted that in 1947 approximately 22% of printing and publishing fuel came from coal, coke and breeze; by 1971, these three sources combined to represent less than 1% of total graphic arts dollars spent on fuel.

While shifting patterns of energy purchases were evolving in the past few decades, consumption soared. Purchased electrical energy jumped to 9.6 billion kilowatt hours in 1971 from 1.3 billion kilowatt hours in 1947. Natural gas consumption, principally by newspapers and commercial printers, rose to 38.3 billion cubic feet in 1971 from 4.6 billion cubic feet in 1947. Recorded fuel oil purchases almost doubled between 1947 and 1971: barrels consumed rose to 1.3 million in 1971 from 0.7 million in 1947. Consumption of coal, coke and breeze fell to 20,000 tons in 1971 from 375,000 tons in 1947, further underlining the shift away from these sources of energy.

The statistics in table 4 reveal a relatively low dependence on fuels in 1971 by the periodical publishing, bookbinding and typesetting industries; relatively high dependence on fuels as a source of energy was noted by the photoengraving, letterpress printing and book printing industries.

Energy Outlook for the Graphic Arts

The Nation's printing and publishing industries have encountered sharply higher energy costs the past few years, and the near term outlook is for continued upward pressure on fuels and electrical energy prices. The extent to which these prices have advanced since 1967 is shown in the following table:

Energy source	Percent increase, 1967-Oct. 1975
Coal	271.3%
Anthracite	286.1
Bituminous	270.2
Coke	231.1
Gas fuels[1]	131.6
Natural gas	129.5
Liquified Petroleum Gas (L.P.G.)	137.8
Electric power[2]	99.5
Commercial power, 40 kw demand	81.5
Industrial power, 500 kw demand	115.8
Petroleum products, refined[2]	174.2
Gasoline	155.5
Middle distillate	222.9
Residual fuels	361.8
Crude petroleum[3]	157.8

[1]Percent increase, 1967-August 1975.
[2]Percent increase, 1967-September 1975.
[3]Domestic production only.

Source: *Wholesale Prices and Price Indexes*, Bureau of Labor Statistics, U.S. Department of Labor.

Clearly, these figures reflect a national average and each region of the country would be subject to an increase at variance from the values listed above. For example, commercial electrical power available in the West South Central region of the United States was up only 35.6% (1967 vs. Sept. 1975) whereas prices for this energy source in the Mid Atlantic states rose 93.9% (1967 vs. Sept. 1975). The same price variations occur with regard to industrial electric power, with the Mountain region of the U.S. showing a price gain of 51.7% (1967 vs. Sept. 1975) compared to the New England region's increase of 129.4% (1967 vs. Sept. 1975).

With no clear signs of price relief evident as yet, printers and publishers are seeking every means to reduce their energy expenses. Some measures, such as improving energy usage through direct conservation efforts or more efficient utilization of existing equipment, are being instituted at once. Longer range energy objectives, however, are proving more elusive. Many sectors of the graphic arts, for example, appear less able to convert from one energy source to another as readily or as economically perhaps as may be the case with other major U.S. manufacturing industries. Equipment suppliers to the graphic arts are under pressure to introduce energy saving machines and materials, and it would seem that efficient energy design will become an increasingly important criteria to management in the equipment selection process. Considering the significant technological changes introduced to the printing and publishing industry over the past few decades, it is not at all inconceivable that energy savings in the graphic arts will at least keep pace with, if not exceed, the energy goals aimed for by other U.S. manufacturing industries.

GRAPHIC ARTS INDUSTRY GROWTH IN 1973 REFLECTS INFLATIONARY ECONOMY

By Rose Marie Bratland

The recently released 1973 Annual Survey of Manufactures (ASM) statistical data give some indication of the impact of inflation on the printing and publishing industries for the 1972-73 period. The data in this Bureau of the Census report include 1973 and 1972 figures for the 17 sectors of Standard Industrial Classification (SIC) 27- Printing, Publishing and Allied Industries. In general, the data show upward movement in virtually all of the statistical measures, with some industries recording sizable increases in wages, value added by manufacture, cost of materials and value of receipts. (See table 5).

Total Industry Gains

For the entire printing and publishing sector, the value of receipts in 1973 totaled $32.9 billion, an increase of 9% over the 1972 total of $30.1 billion. Value added by manufacture amounted to $21.9 billion in 1973, up 8% over the 1972 level. Although value added by manufacture is a more meaningful measure of industrial production, even these dollars were subject to inflationary pressures and, therefore, contain elements not attributable to real growth.

While individual industry segments showed some losses in employment between 1972 and 1973, total industry employment stood at 1,083,500 in 1973, rising 3% for a gain of 27,000 persons. The 1973 increase in employment was significant since graphic industry employment had made only a moderate gain in 1972, after experiencing employment losses in the 1969-71 period. The production worker count followed a similar pattern, rising 2% in 1973 and increasing by 12,000 workers for a total of 649,200. Production workers accounted for exactly three-fifths of total employment in 1973 and for 43% of the change in employment in the 1972-73 period.

Total payroll for the industry in 1973 was 7% above the 1972 level, amounting to $10.5 billion. This was an increase of $696 million over the 1972 figure of $9.8 billion. Production worker wages grew 7% during this period reaching $5.8 billion in 1973, an increase of $371 million. Production worker wages accounted for 55% of total employee wages in 1972 and represented 53% of the increase in wages between 1972 and 1973. The significant rise in payroll for the industry was considerably above the increase in both employment and number of manhours worked in 1973. Chief among the factors accounting for the sizable gain in payroll were the wage increases granted in a number of the industries during the year.

Employment Up Significantly

Of the 17 industries included in SIC 27, over two-thirds reported employment gains in the 1972-73 period. Leading the way in employment was commercial printing, lithographic (SIC 2752) which experienced a 5% rise in total employment, going from 184,000 in 1972 to 192,300 in 1973—a gain of 8,300 workers. Production workers accounted for nearly the entire employment rise in the industry, adding 8,200 persons to the lithography payroll in 1973.

In terms of percentage increases, the engraving and plate printing industry (SIC 2753) was the greatest employment gainer in the 1972-73 period. Total employment in the industry was up 15% and the number of production workers rose 20%. Periodical publishing (SIC 2721), manifold business forms (SIC 2761) and blankbooks and looseleaf binders (SIC 2782) all exceeded their 1972 employment levels by over 5% in 1973. Of particular note was the periodical industry's 14% gain in production workers, which represented 42% of this industry's increase in total employment. Considering that in the periodical publishing industry production workers comprise less than 20% of total employees, this increase in production workers is impressive.

Of the 17 SIC 27 industries, five reported a loss in total employment in the 1972-73 interval; four of the five industries recorded a drop in production workers as well, along with three other industries which did not experience a drop in total employment. Typesetting (SIC 2791) showed the greatest loss in total employment, dropping by 1,300 persons. Much of the loss involved production workers, whose ranks fell by 1,000. In respect to production workers, those in the newspaper publishing industry sustained the largest net loss, dropping 2,400 workers from its count in the 1972-73 period. In terms of percentage decline, the electrotyping and stereotyping industry experienced the largest drop, with a 12% decline in total employment and a 17% loss in production workers. Total employment in this industry amounted to 1,500 in 1973—a loss of 200 workers over the 1972 level. The production worker count for the greeting card industry dropped by nearly 5%; however, total employment for the industry was up over 4%.

Value Added, Materials and Receipts Climb

In the one year period from 1972 to 1973, the printing and publishing industry sector showed strong upward movement in value added by manufacture, cost of materials and value of industry shipments. A considerable portion of this increase was attributable to the impact of inflation on the industries both in terms of labor and material costs. While total value added for the graphic arts industries climbed 8% and shipments were up 9%, cost of materials rose by over 10%.

The manifold business forms industry (SIC 2761) reported tremendous gains in all three measures. Value added by manufacture and industry receipts both grew by 19% in the one year period and cost of material rose 21%. Engraving and plateprinting reported a 14% jump in value added and a 16% rise in industry receipts, as material costs soared 21% in the 1972-73 term. Employment gains in the industry paralleled the rise in receipts during this period. Other industries which recorded increases of more than 10% in all three measures were book printing; commercial printing, lithographic; blankbooks and looseleaf binders; and lithographic platemaking services.

At the low end, several of the printing trade services showed declines or very small gains in value added, cost of materials, and industry receipts. Commercial printers, who normally rely on trade-shop services, cut back on these outside purchases as in-house composition and platemaking facilities were able to handle reduced demands. Typesetting, photoengraving and electrotyping and sterotyping all felt the impact resulting from this decline in economic activity. Electrotyping and stereotyping, reported a 0.5% increase in industry receipts over the 1972 level, a 2% gain in value added and a 4% decline in cost of materials. The photoengraving industry followed close behind with a 0.6% increase in receipts, along with a 0.7% rise in value added and a 2% drop in cost of materials in the 1972-73 term. While photoengraving services are still the primary product in many of these establishments, a change in product mix has likely resulted in some plants formerly classified in the photoengraving industry now being classified in the lithographic platemaking services industry. Although the typesetting industry continues to be a viable industry, principally due to growth in phototypesetting, 1973 industry receipts were up less than 2% over the 1972 level; value added less than 1%, while cost of materials showed a 3% gain. As previously mentioned, employment in these three printing trade industries dropped in the 1972-73 period.

In analyzing the data for the 1972-73 term, it appears that those graphic industries with 10% or more growth in value of receipts experienced a higher degree of real growth with inflationary pressures considered as secondary in the increase. Those industries experiencing a rise in receipts in the 7% to 9% range showed moderate growth and some inflation, while the 4% to 7% gain recorded by some industries was mostly inflationary with little or no growth occurring. Industries showing increases of 3% or less were considered declining industries.

Other Reports in the Series

Data reported in this article are included in the full statistical report for manufacturing industries entitled, *General Statistics for Industry Groups and Industries*, M73 (AS)-1. This was the first in a series of reports to be released in the 1973 Annual Survey of Manufactures program. Other reports in the series are Value of Shipments by Classes of Products, M73(AS)-2; Value of Manufacturers' Inventories, M73(AS)-3; and Expenditures for New Plant and New Equipment, M73(AS)-5. Reports in the series scheduled for publication in the coming months are: data on geographic divisions and states, standard metropolitan statistical areas, and fuels and electrical energy data for selected industries.

The Annual Survey of Manufactures reports are for sale by the Subscriber Services Section (Publications), Bureau of the Census, Washington, D.C. 20233, or any Department of Commerce district office. The entire 1973 series costs $12.75.

Table 5.—General Statistics, Printing and Publishing: 1973 and 1972

Code	Industry group and industry	1973									
		All employees		Production workers			Value added by manufacture	Cost of materials	Value of industry shipments	Capital expenditures, new	End-of-year inventories
		Number	Payroll	Number	Man-hours	Wages					
		(1,000)	(million dollars)	(1,000)	(millions)	(million dollars)	(million dollars)	(million dollars)	(million dollars)	(million dollars)	(million dollars)
27	Printing and publishing	1,083 5	10,523 3	649 2	1,203 2	5,830 1	21,871 2	11,071 7	32,854 7	1,089 5	2,706 1
2711	Newspapers	353 2	3,385 3	167 3	293 2	1,613 9	6,677 0	2,192 4	8,868 4	385 3	187 0
2712	Periodicals	70 1	760 8	12 6	22 7	95 9	2,344 4	1,513 3	3,855 7	60 0	221 5
273	Books	102 0	1,001 6	50 3	95 3	423 7	2,762 0	1,459 0	4,206 7	89 4	770 0
2731	Book publishing	59 2	610 4	15 9	28 5	135 6	2,085 6	1,063 1	3,142 9	54 9	641 9
2732	Book printing	42 8	391 3	34 4	66 9	288 0	676 5	395 9	1,063 9	34 5	118 1
2741	Miscellaneous publishing	38 3	335 4	18 7	32 9	130 3	790 4	302 8	1,088 9	20 1	75 7
275	Commercial printing	356 4	3,523 7	279 2	523 3	2,518 3	6,182 8	4,050 5	10,195 0	400 3	864 7
2751	Commercial printing, letterpress	132 8	1,175 1	105 3	194 3	847 6	2,107 3	1,409 6	3,507 6	115 4	296 1
2752	Commercial printing, lithographic	192 3	2,010 1	147 8	279 9	1,405 4	3,511 1	2,229 1	5,721 5	238 0	490 7
2753	Engraving and plate printing	11 0	88 6	9 0	16 5	62 6	173 5	60 4	233 6	*5 4	14 0
2754	Commercial printing, gravure	20 4	249 9	17 1	32 6	202 7	390 9	351 4	732 2	*41 5	63 9
2761	Manifold business forms	40 9	385 6	30 6	62 5	264 8	978 6	739 9	1,708 4	52 2	196 6
2771	Greeting card publishing	24 5	198 2	11 8	23 7	95 8	530 6	296 9	816 5	33 6	208 0
278	Blankbooks and bookbinding	52 9	402 8	44 6	86 2	301 7	744 7	329 7	1,068 0	21 6	125 1
2782	Blankbooks and looseleaf binders	28 0	215 2	23 0	45 9	155 6	430 9	243 3	667 0	15 8	97 0
2789	Bookbinding and related work	24 9	187 6	21 6	40 3	146 1	313 8	86 4	401 0	5 9	28 1
279	Printing trade services	45 1	529 9	34 1	63 5	385 7	860 6	187 2	1,047 1	27 0	57 5
2791	Typesetting	24 7	269 2	20 0	36 8	205 7	428 8	59 6	490 5	*13 1	24 6
2793	Photoengraving	9 6	119 9	6 7	11 7	82 1	193 1	38 1	231 1	1 8	8 2
2794	Electrotyping and stereotyping	1 5	18 7	1 0	2 0	13 1	29 0	8 0	37 0	* 3	1 4
2795	Lithographic platemaking services	9 3	122 1	6 4	13 0	84 9	209 8	81 5	288 6	11 8	23 3
		1972									
27	Printing and publishing	1,056 1	9,826 9	637 4	1,180 7	5,459 3	20,197 1	10,043 3	30,132 4	1,047 2	2,340 3
2711	Newspapers	348 5	3,168 1	169 7	298 4	1,536 8	6,219 9	2,043 5	8,262 8	359 5	152 5
2721	Periodicals	66 5	708 5	11 1	21 1	84 6	2,109 9	1,404 2	3,510 6	56 8	197 2
273	Books	98 1	918 9	49 2	96 0	397 6	2,540 3	1,292 4	3,794 5	62 3	728 8
2731	Book publishing	57 1	557 7	16 2	31 4	128 6	1,935 8	959 9	2,856 8	48 4	629 4
2732	Book printing	40 9	361 2	33 0	64 5	269 0	604 5	332 4	937 7	33 9	99 4
2741	Miscellaneous publishing	38 8	331 2	19 1	31 7	135 0	775 8	296 1	1,070 2	22 7	68 1
275	Commercial printing	343 8	3,273 1	268 0	502 6	2,320 2	5,682 6	3,670 6	9,315 7	377 3	700 2
2751	Commercial printing, letterpress	130 1	1,131 7	103 9	191 2	813 7	2,003 0	1,302 1	3,291 8	129 2	262 7
2752	Commercial printing, lithographic	184 0	1,835 3	139 6	264 2	1,266 2	3,155 1	1992 7	5,124 8	220 6	373 5
2753	Engraving and plate printing	9 6	80 7	7 5	14 4	58 1	152 4	49 6	201 6	5 1	12 3
2754	Commercial printing, gravure	20 0	225 4	17 0	32 8	182 3	372 2	326 2	697 6	22 5	51 7
2761	Manifold business forms	38 6	343 6	28 8	58 6	235 2	823 6	612 3	1,429 7	45 8	143 8
2771	Greeting card publishing	23 5	191 5	12 4	24 1	93 9	527 0	261 4	774 4	46 4	190 7
278	Blankbooks and bookbinding	51 7	371 6	44 0	83 6	278 9	686 8	284 5	968 2	25 6	104 7
2782	Blankbooks and looseleaf binders	26 6	192 7	22 0	43 2	139 8	390 6	206 3	591 1	14 4	79 6
2789	Bookbinding and related work	25 1	178 9	22 0	40 5	139 1	296 2	78 3	377 2	11 2	25 1
279	Printing trade services	46 6	520 5	35 1	64 6	377 2	831 3	178 5	1,006 3	30 6	54 4
2791	Typesetting	26 0	269 8	21 1	38 1	205 9	426 0	58 1	482 8	14 7	25 3
2793	Photengraving	9 9	119 3	6 6	12 5	81 0	191 7	38 9	229 7	5 4	8 0
2794	Electrotyping and stereotyping	1 7	19 0	1 2	2 1	13 5	28 5	8 3	36 8	5	1 4
2795	Lithographic platemaking services	8 9	112 4	6 2	11 8	76 8	185 1	73 2	257 0	10 5	19 7

Note The figures shown with an asterisk (*) either have associated standard errors exceeding 15 percent or are not consistent with other Census series and related data Thus, at the individual industry level these estimates may be of limited reliability

Source U S Department of Commerce, Bureau of the Census

STATISTICAL SERIES

Table S-1.—U.S. Exports of Books, Periodicals, Other Printed Matter, Looseleaf Binders, and Printing Plates, January-June 1975

[Schedule B Nos. 6423010–6423030, 7182230, 8921110–8929100, 8929400, 8929820–8929850, 8942410]

Description and Schedule B Number	January-June 1975	Percent change from January-June 1974
Grand total	$271,392,569	+14.2
Printing plates and cuts (all processes) (7182230)	2,365,183	+44.0
Printed matter, total	269,027,386	+14.0
Manifold business forms (6423010)	856,547	+8.6
Albums and blankbooks, except business forms (6423020)	1,119,198	+21.8
Loose-leaf binders (6423030)	582,285	−6.5
Maps, charts, atlases, and globes (8921300)	1,939,358	+9.3
Bound periodicals and newspapers (multiple issues) (8921160)	5,997,718	+9.4
Newspapers, unbound (8922010)	1,879,167	+99.0
Periodicals, business and professional (8922030)	3,853,712	+93.7
Periodicals, except business and professional (8922040)	62,686,284	+14.5
Music in books and sheets (8923010, 8923020)	2,159,759	−23.0
Transfers (decalcomanias) (8924100)	3,572,729	−4.3
Picture postcards, except greeting cards (8924210)	366,276	+6.8
Greeting cards (8924220)	1,859,116	−9.7
Paper and paperboard labels and wrappers (8929100)	4,877,622	−12.9
Calendars, including calendar blocks, of paper (8929400)	535,343	−7.1
Advertising printed matter (8929820)	11,100,530	+24.2
Catalogs and directories (8929830)	2,686,508	+4.6
Business service publications (8929840)	224,941	−83.8
Playing cards (8942410)	2,335,461	−22.9
Printed matter, n.e.c. (8929850)	26,491,743	+28.8
Books, total	133,903,089	+14.3
Textbooks, workbooks and standardized tests (8921110)	34,011,054	+34.4
Technical, scientific, and professional books, except school textbooks (8921120)	21,290,685	+11.4
Bibles, Testaments, and other religious books (8921130)	7,598,584	+31.1
Dictionaries (8921140)	2,106,299	−37.6
Encyclopedias (8921150)	17,905,415	+6.2
Books, n.e.c. (8921170)	48,285,693	+10.8
Children's picture and painting books (8921200)	2,705,359	−13.0

Note: Data do not include individual shipments valued under $250.

n.e.c.—Not elsewhere classified.

Source: U.S. Department of Commerce, Bureau of the Census.

Table S-2.—U.S. Exports of Books, Periodicals, Other Printed Matter, Looseleaf Binders, and Printing Plates, January-June 1975

[Schedule B Nos. 6423010–6423030, 7182230, 8921110–8929100, 8929400, 8929820–8929850, 8942410]

Principal markets	January-June 1975	Percent change from January-June 1974	Principal markets	January-June 1975	Percent change from January-June 1974
Argentina	$ 931,659	−13.9	Japan	$11,475,192	−11.6
Australia	21,217,633	+21.2	Mexico	9,579,295	+34.2
Bahamas	831,774	+2.2	Netherlands	6,577,078	+22.4
Belgium-Luxembourg	1,443,069	−9.9	New Zealand	3,069,820	+22.2
Brazil	2,915,520	−5.1	Panama	2,032,569	+42.4
Canada	124,912,596	+12.7	Peru	1,096,414	−15.4
Chile	472,612	+219.6	Philippines	2,413,272	−13.8
Columbia	812,025	+40.6	Republic of Korea	553,052	+26.0
El Salvador	268,050	+8.5	Republic of S. Africa	4,492,587	+18.8
France	4,207,220	−3.7	Singapore	3,060,082	+12.2
Greece	615,809	+42.9	Spain	1,138,950	+14.4
Hong Kong	976,279	−16.8	Sweden	1,190,203	+7.3
India	1,208,767	−1.8	Switzerland	2,068,640	+45.2
Israel	770,096	+7.5	United Kingdom	27,800,542	+18.9
Italy	2,284,977	−20.0	Venezuela	3,853,449	+42.7
Jamaica	1,693,705	+55.3	West Germany	4,790,676	+4.8

Note: Data do not include individual shipments valued under $250.

Source: U.S. Department of Commerce, Bureau of the Census.

Table S-3.—U.S. Imports of Books, Periodicals, Other Printed Matter, and Printing Plates, January-June 1975

[TSUSA Nos. 2565600-2566000, 2700500-2701500, 2702520-2702580, 2704500, 2705000, 2705500, 2706300, 2707000, 2708500, 2731000, 2733000, 2733500, 2736500-2743500, 2746000-2749000, 6683800, 7342500, 7375200]

Description and TSUSA number	January-June 1975	Percent change from January-June 1974
Grand total	$138,370,087	+11.9
Printing plates and cuts (all processes)(6683800)	300,681	−40.7
Printed matter, total	138,069,406	+12.2
Newspapers (2705500)	8,483,551	+1.7
Periodicals (2706300)	13,577,503	−1.8
Tourist literature about places outside the U.S. (2707000)	2,387,191	−0.5
Printed catalogs offering U.S. products (2704500, 2705000)	2,087,079	+28.4
Catalogs, price lists, and trade notices of foreign businesses (2708500)	2,484,347	+23.6
Music in books or sheets (2731000)	578,647	−4.0
Globes (2733000)	146,973	+5.3
Maps, charts and atlases (2733500)	1,550,632	+7.2
Decalcomanias in ceramic colors (2736500, 2737000)	776,113	+42.8
Other decalcomanias (2737500, 2738000)	6,231,442	+105.2
Postcards (2738500-2739500)	179,204	−30.4
Greeting cards and social and gift cards, with words (2740500)	1,888,943	+25.3
Other greeting cards and social and gift cards (2740000)	157,743	+53.6
Calendars of paper (2741000-2742000)	416,065	−3.1
Labels, flaps, and bands (2742300-2743500)	528,920	−12.3
Pictorial matter, lithographed, n.s.p.f.(2746000, 2746500)	4,964,225	+16.5
Photographs, exposed film, and other pictorial printed matter, n.s.p.f. (2747000)	3,141,731	+1.4
Playing cards (7342500)	954,230	+3.9
Diaries, notebooks, and address books (2565600)	1,855,493	−29.6
Other blankbooks (2565800)	127,740	+23.8
Albums (autograph, photograph, record, stamp)(2566000)	4,115,365	−8.6
Printed matter, n.s.p.f., suitable for use in book production (2747300)	1,395,850	+65.3
Other printed matter (2700500-2701500, 2747500-2749000)	6,474,905	+7.0
Books, total	73,565,513	+15.3
Bibles and prayer books (2702520)	2,393,992	+31.7
Books, foreign language (2702540)	8,141,548	+18.2
Other books, n.s.p.f., wholly or in part the work of an author who is a U.S. national or domiciliary (2702560)	1,800,781	+20.6
Other books (2702580)	60,561,057	+15.6
Toy books and coloring books (7375200)	668,135	−45.8

Note: Data do not include individual shipments valued under $250.

n.s.p.f.—Not specially provided for.

Source: U.S. Department of Commerce, Bureau of the Census.

Table S-4.—U.S. Imports of Books, Periodicals, Other Printed Matter, and Printing Plates, January-June 1975

[TSUSA Nos. 2565600-2566000, 2700500-2701500, 2702520-2702580, 2704500, 2705000, 2705500 2706300, 2707000-2708500, 2731000, 2733000, 2733500, 2736500-2743500, 2746000-2749000, 6683800, 7342500, 7375200]

Principal suppliers	January-June 1975	Percent change from January-June 1974	Principal suppliers	January-June 1975	Percent change from January-June 1974
Australia	$ 328,427	+83.3	Italy	$ 6,009,432	−32.1
Austria	389,367	+37.3	Japan	10,200,145	−19.2
Belgium-Luxembourg	2,486,310	+84.8	Mexico	4,458,590	−2.6
Canada	24,974,497	−2.3	Netherlands	5,086,928	−18.8
Czechoslovakia	130,778	−24.6	Spain	10,032,343	+58.6
Denmark	628,480	+48.0	Sweden	950,138	+14.6
France	4,818,738	+26.0	Switzerland	2,694,038	+18.9
Hong Kong	4,373,830	+35.8	United Kingdom	40,461,642	+28.1
Ireland	390,151	+75.1	Venezuela	125,664	−30.8
Israel	3,451,553	+138.2	West Germany	8,797,216	+47.4

Note: Data do not include individual shipments valued under $250.

Source: U.S. Department of Commerce, Bureau of the Census.

Table S-5.–Selected U.S. Statistics: Printing Publishing, and Allied Industries, Annual Average, 1973 and 1974-75 by Quarters

Economic indicators	First quarter		Second quarter		Third quarter		Fourth quarter		Annual average
	1975[r]	1974[r]	1975[p]	1974[r]	1975	1974[r]	1975	1974[r]	1973
NATIONAL INCOME AND PRODUCT[a]									
National income ... bil. $ ..	1,150.7	1,118.8	1,175.4	1,130.2		1,155.2		1,165.4	1,065.6
Compensation of employees ... do ..	875.6	828.8	885.4	848.3		868.2		877.7	786.0
Wages and salaries ... do ..	765.1	727.6	773.0	744.6		761.5		769.2	691.6
Supplements to wages, salaries ... do ..	110.5	101.2	112.4	103.7		106.7		108.6	94.4
Personal income ... do ..	1,193.4	1,112.5	1,220.5	1,134.6		1,168.2		1,186.9	1,055.0
Disposable personal income ... do ..	1,015.5	950.6	1,078.5	966.5		993.1		1,008.8	903.7
Personal consumption ... do ..	913.2	840.6	938.6	869.1		901.3		895.8	805.2
Gross national product ... do ..	1,416.6	1,358.8	1,440.9	1,383.8		1,416.3		1,430.9	1,294.9
Manufacturers' new plant and equipment exp ... do ..	49.05	42.96	48.78	45.32		47.01		48.08	37.88
PURCHASING POWER OF THE DOLLAR[a]									
As measured by:									
Wholesale prices ... 1967 = $1.00 ..	.583	.671	.578	.647		.604		.584	.744
Consumer prices ... do ..	.637	.711	.627	.687		.667		.648	.752
INDUSTRIAL PRODUCTION INDEX (FRB)[b]									
All manufacturing ... 1967 = 100 ..	109.0	124.1	110.4	127.5		125.2		120.7	125.1
PRINTING AND PUBLISHING INDUSTRIES (SIC 27)									
Production index (FRB)[b] ... 1967 = 100 ..	97.1	103.8	103.9	113.1		121.3		111.4	113.2
Corporate sales[c] ... mil. $ ..	8,404	8,772	8,948	8,462		8,673		9,328	7,608
Corporate net profits:[c]									
Before taxes ... do ..	530	643	746	819		705		752	667
After taxes ... do ..	285	359	421	450		406		427	364
Percent of sales ...	3.4	4.1	4.7	5.3		4.7		4.6	4.8
All employees ... thous ..	1,089.5	1,111.5	1,072.4	1,111.4		1,111.0		1,110.4	1,097.8
Production workers ... do ..	645.6	671.0	630.7	666.0		668.5		664.8	662.5
Average weekly earnings ... $ ..	191.09	179.99	194.39	4.90		5.01		5.11	4.68
Average hourly earnings ... $ ..	5.18	4.82	5.30	4.90		5.01		5.11	4.68
Average weekly hours ...	36.9	37.4	36.7	37.4	n.a.	37.8	n.a.	37.7	37.9
NEWSPAPERS (SIC 271)									
Advertising (64 cities)[d] ... mil. lines ..	958.6	897.1	1,052.6	981.0		897.4		981.7	3,786.1
All employees ... thous ..	377.6	384.2	373.8	382.6		384.1		383.0	382.3
Production workers ... do ..	169.5	178.3	166.5	183.1		174.9		174.1	180.7
Average weekly earnings ... $ ..	194.5	182.89	198.87	188.64		192.33		196.73	182.31
Average hourly earnings ... $ ..	5.70	5.33	5.80	5.41		5.49		5.64	5.15
Average weekly hours ...	34.1	34.3	34.3	34.9		35.0		35.9	35.4
PERIODICALS (SIC 272)									
Advertising cost, total[e] ... mil. $ ..	297.5	290.2	345.9	363.5		295.7		416.4	1,316.0
All employees ... thous ..	69.6	68.8	69.3	68.9		68.9		70.7	68.7
Production workers ... do ..	20.1	20.2	18.9	19.7		19.6		20.6	20.3
Average weekly earnings ... $ ..	202.5	206.67	201.9	204.15		206.79		203.00	205.64
Average hourly earnings ... $ ..	5.30	5.22	5.31	5.26		5.28		5.26	5.09
Average weekly hours ...	38.2	39.6	38.0	38.8		39.2		38.6	40.4
BOOKS (SIC 273)									
All employees ... thous ..	100.9	99.3	99.5	101.6		101.3		100.3	100.7
Production workers ... do ..	55.4	55.0	53.7	56.7		56.2		54.7	54.8
Average weekly earnings ... $ ..	167.20	159.04	169.5	164.72		171.76		170.35	161.93
Average hourly earnings ... $ ..	4.42	4.12	4.52	4.22		4.37		4.46	4.11
Average weekly hours ...	37.8	38.7	37.5	39.0		39.2		38.2	39.4
COMMERCIAL PRINTING (SIC 275)									
All employees ... thous ..	355.6	361.4	348.3	362.0		361.3		362.5	347.3
Production workers ... do ..	266.9	276.3	262.6	276.9		276.0		275.5	265.4
Average weekly earnings ... $ ..	195.79	183.95	200.1	186.78		194.98		197.33	181.50
Average hourly earnings ... $ ..	5.19	4.81	5.33	4.89		5.05		5.12	4.69
Average weekly hours ...	37.7	38.3	37.6	38.2		38.6		38.6	38.7

See footnotes at end of table.

Table S-5.—Selected U.S. Statistics: Printing, Publishing, and Allied Industries, Annual Average, 1973 and 1974-75 by Quarters—Con.

Economic indicators	First quarter		Second quarter		Third quarter		Fourth quarter		Annual average
	1975[r]	1974[r]	1975[p]	1974[r]	1975	1974[r]	1975	1974[r]	1973
COMM. PRTG., EXC. LITHO. (SIC 2751)									
All employees ..... thous..	204.0	206.9	200.4	207.1		207.7		209.3	202.8
Production workers ..... do..	155.5	161.4	153.4	161.3		161.8		161.7	157.5
Average weekly earnings ..... $..	188.67	175.46	194.75	179.38		186.55		190.52	173.57
Average hourly earnings ..... $..	5.02	4.63	5.19	4.74		4.85		4.94	4.52
Average weekly hours	37.5	37.9	37.5	37.9		38.4		38.6	38.4
COMM. PRTG., LITHO. (SCI 2752)									
All employees ..... thous..	141.6	143.1	137.0	143.5		143.0		142.3	133.7
Production workers ..... do..	103.1	106.5	101.0	107.2		106.6		105.8	99.8
Average weekly earnings ..... $..	207.02	198.67	209.06	199.28		209.37		209.72	194.54
Average hourly earnings ..... $..	5.51	5.12	5.59	5.19		5.39		5.46	4.95
Average weekly hours	37.8	38.8	37.4	38.4		38.9		38.4	39.3
BOOKBINDING AND RELATED INDUSTRIES (SIC 278)									
All employees ..... thous..	53.5	55.6	48.8	55.3		55.6		53.8	56.8
Production workers ..... do..	41.3	46.4	39.9	46.4		46.7		44.9	47.4
Average weekly earnings ..... $..	148.88	138.43	153.23	141.74		133.60		159.38	134.43
Average hourly earnings ..... $..	3.97	3.63	4.05	3.72		3.72		3.87	3.51
Average weekly hours	37.7	38.1	37.8	38.1		38.4		38.5	38.3
OTHER PRINTING AND PUBLISHING INDUSTRIES (SIC 274, 6, 7, 9)									
All employees ..... thous..	139.4	142.1	132.7	141.5	n.a.	141.2	n.a.	140.2	142.1
Production workers ..... do..	92.3	94.9	89.1	95.0		95.1		95.1	94.0
Average weekly earnings ..... $..	200.03	189.76	200.74	191.32		197.38		201.62	180.73
Average hourly earnings ..... $..	5.26	4.90	5.34	4.97		5.06		5.13	4.67
Average weekly hours	38.0	38.7	37.6	38.5		39.0		39.3	38.7
PAPER PRODUCTION, CONSUMPTION, INVENTORY AND PRICES									
Newsprint:									
Used by publisher[f] ..... thous. tons..	1,528	1,727	1,638	1,830		1,674		1,793	*7,658
Publishers' inventory[f] ..... do..	955	694	1,032	718		759		788	603
Price, rolls, contract (BLS) ..... $..	253.28	187.91	257.32	220.09		229.04		229.04	170.44
PAPER									
Production:[g]									
Groundwood, uncoated:									
Publication and printing ..... short tons..	323,584	350,717	274,435	349,412		332,211		331,097	*1,321.3
Coated, printing and converting:									
Coated, one side ..... do..	106,488	141,567	107,334	144,070		131,457		116,368	*457.1
Coated, two sides ..... do..	723,839	863,345	659,852	879,785		836,041		814,064	*3,400.0
Book, uncoated:									
Publication and printing ..... do..	343,422	524,373	365,505	512,544		483,848		463,969	*2,009.9
Writing:									
Chemical wood pulp ..... do..	560,569	844,015	596,469	862,171		848,722		791,441	*3,091.5
Wholesale price index (BLS):									
Form bond, 12 lb. ..... 1973 = 100..	147.7	105.1	143.2	120.0		140.9		148.6	100.0
Book paper, No. 3 plain, offset ..... 1967 = 100..	170.9	129.1	153.9	145.1		166.3		174.3	121.0
Wood bond ..... do..	149.8	127.8	149.2	145.0		150.0		149.7	128.7

Note: Employment and earnings data from Department of Labor, Bureau of Labor Statistics (BLS). Data for most recent quarter are preliminary. FRB-Federal Reserve Board. [r]Revised. [p]Preliminary. n.a.—Not available. *Cumulative. [a]*Survey of Current Business, Bureau of Economic Analysis.* Quarterly dates are seasonally adjusted at annual rates. [b]Without seasonal adjustment. [c]*Quarterly Financial Report,* Federal Trade Commission. Beginning 1974 data reflect a revision in statistical collection procedures; hence, are not strictly comparable with earlier periods. [d]Media Records, Inc. Data are three months totals. [e]Publishers' Information Bureau, Inc. Data are three months totals. [f]American Newspaper Publishers' Assn., approximately 75% of total newsprint used. Consumption data are three months total. Beginning 1974, data reflect reduction in basis weight of newsprint from 32 to 30 pounds for 500 sheets, 24" x 36". Data for prior years not converted; hence, not strictly comparable. [g]Bureau of the Census. Data are three months totals. Exports generally equal imports, production usually equivalent to consumption.

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